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Japan's Poultry

Outbreaks of avian influenza dramatically changed Japan's trade patterns in 2004. Japan sharply curtailed poultry imports from China and Thailand due to outbreaks of Highly Pathogenic Avian Influenza (HPAI). Several cases of low path avian influenza in the U.S. interrupted poultry shipments to Japan. The U.S. found HPAI in a small flock, a different type than was found in Asia, and Japan placed restrictions on the affected state.

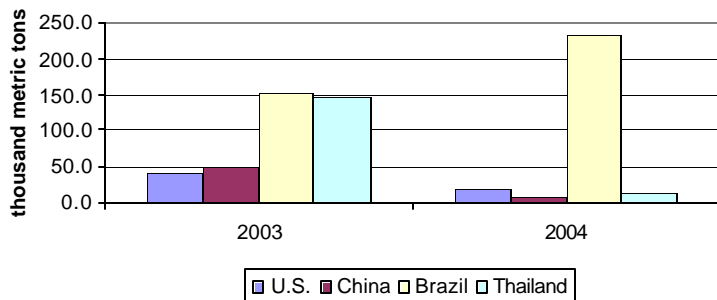
Poultry imports from China were halted after HPAI was confirmed in China. Japan's Chinese imports fell from 6,786 MT in January to 935 MT in February to zero for March and April. For the first 10 months in 2004, imports of frozen broilers totaled 8,375 MT compared to 51,274 for the same period in 2003. There were no imports of fresh or chilled broilers from China for February through October 2004.

Japan imported 12,190 MT of frozen broilers from Thailand in January 2004, before Thailand confirmed outbreaks of HPAI. For the next nine months, only 59 metric tons more were imported, totaling 12,249 MT for January through October 2004. Broiler imports from Thailand reached 146,467 MT for January through October 2003.

January through October 2004 broiler imports from the U.S. fell to 19,886 MT compared to 42,699 MT for the same period in 2003. Imports declined sharply in February and again for April through July, recovering in August. Japan reacted to the presence of low path avian influenza in the U.S. by immediately halting imports, only to resume most imports once the strain of avian influenza was confirmed to be low path.

Brazil was the major beneficiary of Japan's bans on poultry imports from China, Thailand and the U.S. Japan's poultry imports from Brazil grew from 152,580 MT for the first ten months in 2003, to 232,419 MT for the same period in 2004.

**Japan: Frozen Broiler Imports
Jan-Oct Comparisons**



Source: ALIC, OIE, news wires

China

China is recovering from an outbreak of highly pathogenic avian influenza (HPAI) in January 2004. China quickly culled over 9 million birds to contain the disease and on March 19, 2004 announced no new outbreaks had been reported in 32 days. In early July, China reported a single case of HPAI on a relatively isolated farm in Anhui province. China cleared the area through vaccination, culling and surveillance.

According to the China's Ministry of Agriculture (MOA), poultry production in the first quarter fell four percent. Total poultry production for the first half of 2004 recovered to a net decline of one percent. For 2005, China's poultry production is forecast to recover to 9.9 MMT, about the same as pre-avian influenza 2003 level.

Imports are estimated to fall 55 percent in 2004 due to decreased U.S. imports. China banned U.S. poultry imports in February 2004, due to avian influenza in the U.S. and increased imports from Brazil and Argentina.

China's broiler meat exports are recovering. Japan, China's largest export market, reopened its cooked broiler market to China. Hong Kong, China's second largest export market, fully reopened for all kinds of broiler products.

China Broiler Meat: Supply and Demand in '000 metric tons

Market Year	2003	2004 Estimates	2005 Forecast
Production	9,898	9,700	9,990
Imports	483	220	300
Exports	388	440	490
Consumption	9,993	9,480	9,800

The challenge is to prevent HPAI from reoccurring in China. Viet Nam and Thailand both reported outbreaks in January 2005. Chinese authorities established an 18 mile wide "immune protection zone" along the 746 mile border between Yunnan Province and Viet Nam. Stations were set up to inspect and disinfect all vehicles and people passing through the area.

This year the Chinese New Year falls on February 9, with New Year's Eve celebrations on February 8. Also called the Spring Festival, this is the largest holiday in Chinese culture and chicken is served at most meals. Movement of poultry and poultry products will increase. The travel season begins on January 27 and runs for 40 days. Tens of millions of Chinese travel to their hometowns. Hundreds of thousands of Chinese migrant workers travel from the large cities to their rural homes for the holiday.

Hong Kong normally allows 30,000 live birds to be imported daily from the mainland. Import quotas for January 30 through February 4 were relaxed to allow 50,000 birds daily and the quota will be lifted February 5 through February 7 to allow consumers to stock up before the three day holiday that begins on February 8.

Source: OIE, USDA/FAS, FAO/IDeNews, news wires

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

Week Ending January 22, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Liquid	105	194	669 342
Frozen	0	0	0 0
Dried	0	9	6 9
Total	105	203	675 351

U.S. Imports From Canada, in Pounds (000) (Preliminary)

Week Ending January 22, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Liquid	245	182	579 359
Frozen	52	40	59 88
Dried	40	116	120 195
Total	337	338	758 642

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

Week Ending January 22, 2005		Year-To-Date	
TYPE	2005	2004 1/	2005 2/ 2004
Jumbo	0	0	0 50
Extra Large	0	750	0 750
Large	0	0	550 2,093
Medium	600	0	1,965 30
Ungraded	0	0	0 0
Misc	0	0	0 0
Total	600	750	2,515 2,923

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

U.S./Canadian Live Poultry Slaughtered Under Inspection

W/E 22-Jan-05 (PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,451	1,205	2,656
Last Week	1,625	1,219	2,844
Same week yr ago	1,429	1,228	2,657
To-date/2005	4,547	3,907	8,454
To-date/2004	4,213	3,818	8,031

U.S. FOWL SLAUGHTERED IN CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	359	0	359
Last Week	428	0	428
Same week yr ago	309	18	327
To-date/2005	1,088	0	1,088
To-date/2004	998	18	1,016

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

	LIGHT HENS	HEAVY HENS	TOTAL HENS
	THOUSANDS		
Head	1,810	1,205	3,015
Last Week	2,053	1,219	3,272
Same week yr ago	1,738	1,246	2,984
To-date/2005	5,635	3,907	9,542
To-date/2004	5,211	3,836	9,047

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jan 28, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	-	19.00	81,600	-
WTD AVERAGE		19.00		
15-20%				
RANGE	-	12.75-18.00	1,122,000	81,600
WTD AVERAGE		15.26		
20% OR MORE				
RANGE	-	-	-	-
WTD AVERAGE				

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

Jan 28, 2005

CHICKEN WITH SKIN ADDED

FAT CONTENT	--- PRICES ---		---- VOLUME ----	
	FROZEN	FRESH	TOTAL	EXPORT
15% OR LESS				
RANGE	18.25	18.25-22.00	448,000	208,000
WTD AVERAGE	18.25	20.13		
15-20%				
RANGE	16.00-22.00	14.00-20.00	3,146,000	1,986,000
WTD AVERAGE	18.85	16.99		
20% OR MORE				
RANGE	-	19.00	120,000	-
WTD AVERAGE		19.00		

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 28 JANUARY 2005.

Demand was light for fresh and frozen breast meat, good for fresh destrapped tenders and fresh and frozen breast trim. The market tone was barely steady to weak on breast meat, whole tenders and frozen destrapped tenders. Steady to fully steady on fresh destrapped tenders and fresh and frozen breast trim. Offerings were light. Demand for bulk parts were light. Export demand was moderate. No trading was reported.

FRIDAY, JANUARY 28, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/ R	WTD AVG PRICE	VOLUME (000) 240	WEEKLY WTD AVG PRICE 39.00	WEEKLY VOLUME (000) 240
DRUMSTICKS, TOMS			39.00	240		
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM						
TAILS		F	23.00	162		
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		R	17.00	120	17.00	120
		F	87.00	40		

THURSDAY, JANUARY 27, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/ R	WTD AVG PRICE	VOLUME (000) 240
DRUMSTICKS, TOMS	39.00		39.00	240
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	23.00	162
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN	17.00		17.00	120
		F	87.00	40

WEDNESDAY, JANUARY 26, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/ F	WTD AVG PRICE	VOLUME (000) 858
DRUMSTICKS, TOMS		F	37.49	858
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	23.00	162
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		F	19.00	80
		F	87.00	40

TUESDAY, JANUARY 25, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/ F	WTD AVG PRICE	VOLUME (000) 858
DRUMSTICKS, TOMS		F	37.49	858
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	23.00	162
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		F	19.00	80
		F	87.00	40

MONDAY, JANUARY 24, 2005**EXPORT TRADING**

	PRICE RANGE	L.S.T. CODE 1/ F	WTD AVG PRICE	VOLUME (000) 858
DRUMSTICKS, TOMS		F	37.49	858
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM				
TAILS		F	23.00	162
MECHANICALLY SEPARATED 2/ THIGH MEAT - FROZEN		F	19.00	80
		F	87.00	40

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.

INSPECTED EGG PRODUCTS - U.S. & CANADA IMPORT/EXPORT TRADE**U.S. EXPORTS TO CANADA, IN POUNDS (000) (PRELIMINARY)**

TYPE	Week Ending		Year-To-Date	
	January 15, 2005			
	2005	2004 1/	2005 2/	2004
LIQUID	411	99	564	148
FROZEN	0	0	0	0
DRIED	0	0	6	0
TOTAL	411	99	570	148

TYPE	Week Ending		Year-To-Date	
	January 15, 2005			
	2005	2004 1/	2005 2/	2004
LIQUID	160	59	334	177
FROZEN	0	45	7	48
DRIED	40	79	80	79
TOTAL	200	183	421	304

INSPECTED SHELL EGGS**U.S EXPORTS TO CANADA, IN 30-DOZEN CASES (000) (PRELIMINARY)**

TYPE	Week Ending		Year-To-Date	
	January 15, 2005			
	2005	2004 1/	2005 2/	2004
Jumbo	0	0	0	50
Extra Large	0	0	0	0
Large	0	0	550	2,093
Medium	765	0	1,365	30
Ungraded	0	0	0	0
Misc	0	0	0	0
Total	765	0	1,915	2,173

1/ Comparable Week, to-date figures may not total due to rounding. 2/ Includes revisions to previous week(s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.